Jay Mota, MAFF®, CDFA®, CFP®, CQS®, WMCP®, ChFC®,

MASTER ANALYST IN FINANCIAL FORENSICS
CERTIFIED DIVORCE FINANCIAL ANALYST
CERTIFIED FINANCIAL PLANNER™ practitioner

Divorce Logic LLC
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Curriculum Vitae

Education and Training

Master Analyst in Financial Forensics, MAFF®
National Association of Certified Valuators and Analysts

Certified Divorce Financial Analyst, CDFA®
The Institute for Divorce Financial Analyst

Certified Financial Planner, CFP®
Certified Financial Planner Board of Standards, Inc

Certified (Q)DRO Specialist CQS®
American Association of Certified QDRO Professionals

Wealth Management Certified Professional, WMCP®
The American College of Financial Services

Chartered Financial Consultant, ChFC®
The American College of Financial Services

General Securities Registered Representative
FINRA Series 7 Licensed

Uniform Securities Agent State Law Examination
FINRA Series 63 Licensed

Uniform Investment Adviser Law Examination
FINRA Series 65 Licensed

Investment Company Products/Variable Contracts Representative Examination
FINRA Series 6 Licensed

Life, Health, Variable Annuity, Property and Casualty Insurance Licenses
NY, NJ, CT, FL, WA, IL, TX

Trained Divorce Mediator
In accordance with requirements of the Academy of Professional Family Mediators

Interdisciplinary Collaborative Law Professional
Pennsylvania Bar Association

Master of Strategic Communication
Fordham University, Gabelli School of Business

Financial Planning Professional Development
New York University School of Business

Bachelor of Business Administration
University of Phoenix

United States Marine Corps
Honorable Discharge

Professional Experience

- Over 26 years' experience in financial services with a fiduciary focus in financial analysis, planning, education, investment management, and planning for the dissolution of marriage.
- Separate property tracing, including retirement plans, commingled inheritances, and marital wasting claims.
- Pension plan document review, defined benefit asset valuation, and Qualified Domestic Relations Order plans.
- Executive compensation valuations, including restricted stock, options, and other complex compensation plans.
- Risk management planning to include the evaluation of life, health, disability, property, casualty, insurance.
- Planning for families with disabilities or special needs to include trusts, estate planning, SSI, and benefits.
- Comprehensive financial planning, wealth management strategies, estate equalization planning, tax planning, estate planning, philanthropy, and charitable giving.

Professional Memberships and Affiliations

- Association of Divorce Financial Planners (ADFP)
- Foundation for Financial Planning, Pro Bono Financial Planning
- National Association Divorce Professionals (NADP)
- Additional membership in the NADP Special Needs Chapter
- American Academy of Matrimonial Lawyers NJ (AAML NJ)
- National Association of Certified Valuators and Analysts (NACVA)
- International Academy of Collaborative Professionals (IACP)
- New York Association of Collaborative Professionals (NYACP)
- New York Divorce University
- The Home of the National Association of Insurance (NAIFA)
- Institute for Divorce Financial Analyst (IDFA)
- Certified Financial Planning Board
- The American College of Financial Services Alumni Council
- New Jersey CPA Society
- Bergen County, New Jersey Bar Association
- Rockland County Bar Association

Recent Appearances and Article Titles

- (Q)DROs – The Process and Recent Changes You Should Know: CLE Presentation
- Financial Concerns with Divorce: Everything you need to know about financials when preparing for divorce.
- How to prepare for divorce: An ultimate guide with divorce checklist, article featured in Wealthy Single Mommy, August 28th,2023.
- How To Be Prepared for Financial Surprises, article featured in Nasdaq, Yahoo Finance, Go Banking Rates, March 15th, 2023.
- Rising Interest Rates Could Reduce Lump-Sum Pension Payouts, Article, NJ CPA Magazine Winter 2022/23
- Dos and Don'ts of a Divorce, The Divorce Hour Show, June 21, 2022
- The Grey Divorce, The Divorce Hour Show, May 17th, 2022
- How Charitable Giving Affects the Comprehensive Financial Plan, Article, NJ CPA Magazine, April 22, 2022
- The Importance of Creating an Economic Blueprint if You Are Going Through a Divorce and Have a Child with Special Needs, Article in The Medium, April 7th, 2022
- Critical Financial Decisions for Divorcing Couples, The Divorce Hour Show, April 9th, 2022
- Talk Financial Wellness with Jay Mota, Webinar July 22nd, 2021
- Financial Planning for the Blended Family, Divorce Dialogues Show, May 5th, 2021